COMPANY ADMINISTRATION GUIDE

Rev. 201802

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Overview

This guide will provide the steps necessary for a customer administrator to manage:

- Company preferences and available reports
- Users and groups
- Usage
- Billing and credit cards, if necessary

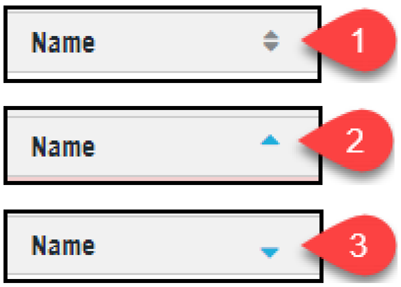
Contact DataTree Customer Service at 800.708.8463 for more help with your DataTree account.

Before You Begin

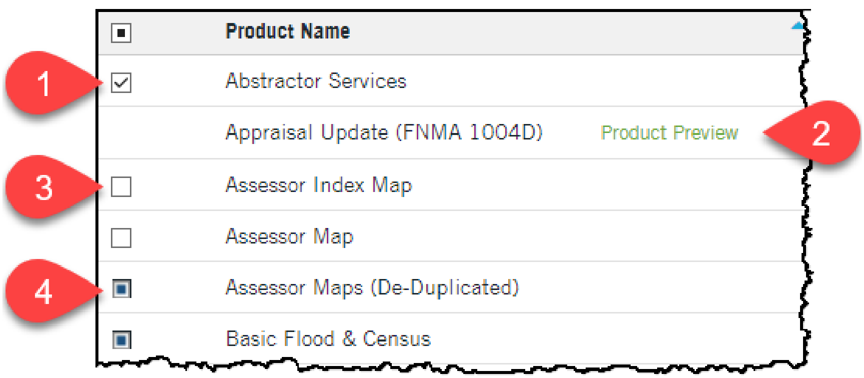
This manual covers information available only to Company Administrators or Group Managers.

Some tables include column headers which can sort the information (1, unsorted). Click on the column header to sort ascending (2) or descending (3).

Pencil icons (4) indicate an editable field.



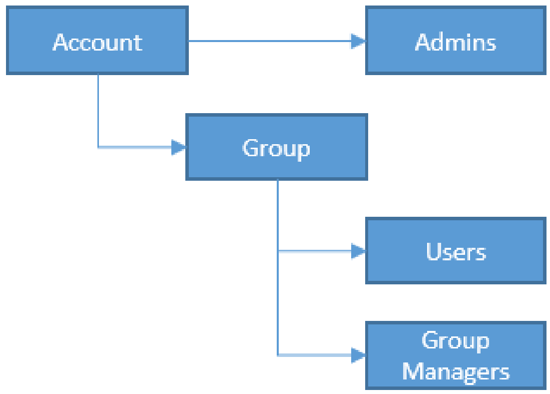
Tables with selections can be setup several different ways for end users:



1. Checked	Product available and orderable in the left hand panel of DataTree.
2. No Check Box / Product Preview	Product only shows a sample. Contact your Account Manager to provision this as the service is not part of your contract.
3. Unchecked	Available for your contract but not enabled for your end-users. Click to put a check in the box and enable it for your users.
4. Checkbox blocked out	Product available but enabled for only some users and groups.

If you make any modifications, make sure you click Save before leaving the page.

Below are details on how users and groups are used in DataTree.

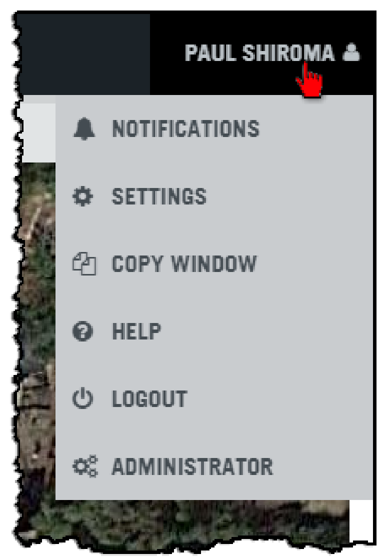


Top level admins can create groups, users, add new Admins or Group Managers. They can limit product access by group or user.

Groups inherit permissions from the parent account. Reports can be further limited by group so that each group provides users with only the reports necessary for their job.

Group Managers can have unique admin abilities, such as View only and can be set to admin-only which removes product access.

To access the Company Administration tools, click the Profile menu at the top right hand corner of the window and select Administrator.



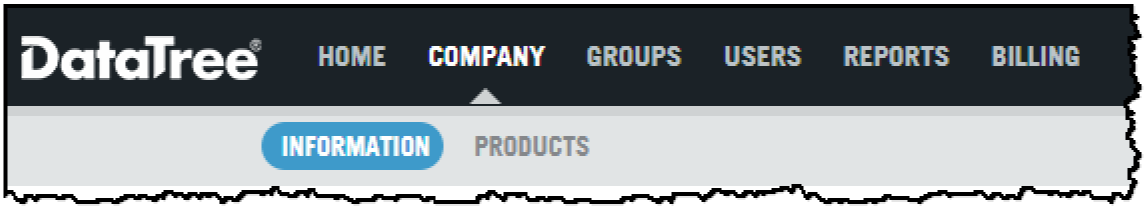
The navigation bar at the top of the Administration page includes options to manage your account, users, group, usage and billing.

Home:	Exit the administration page and return to the product home page.
Company:	View and manage company information, preferences, admins, audit activity and products.
Groups:	View, create and manage groups. Add users to groups. View audit activity by group.
Users:	View, create, suspend, move and manage users; assign users to groups; reset passwords.
Reports:	View and export usage and user account lists.
Billing:	View and manage billing, payment options, and billing contacts.

The manual will review each option in turn. When you are finished with your administration tasks, click the Home menu or click the Profile menu and click Logout to exit DataTree.

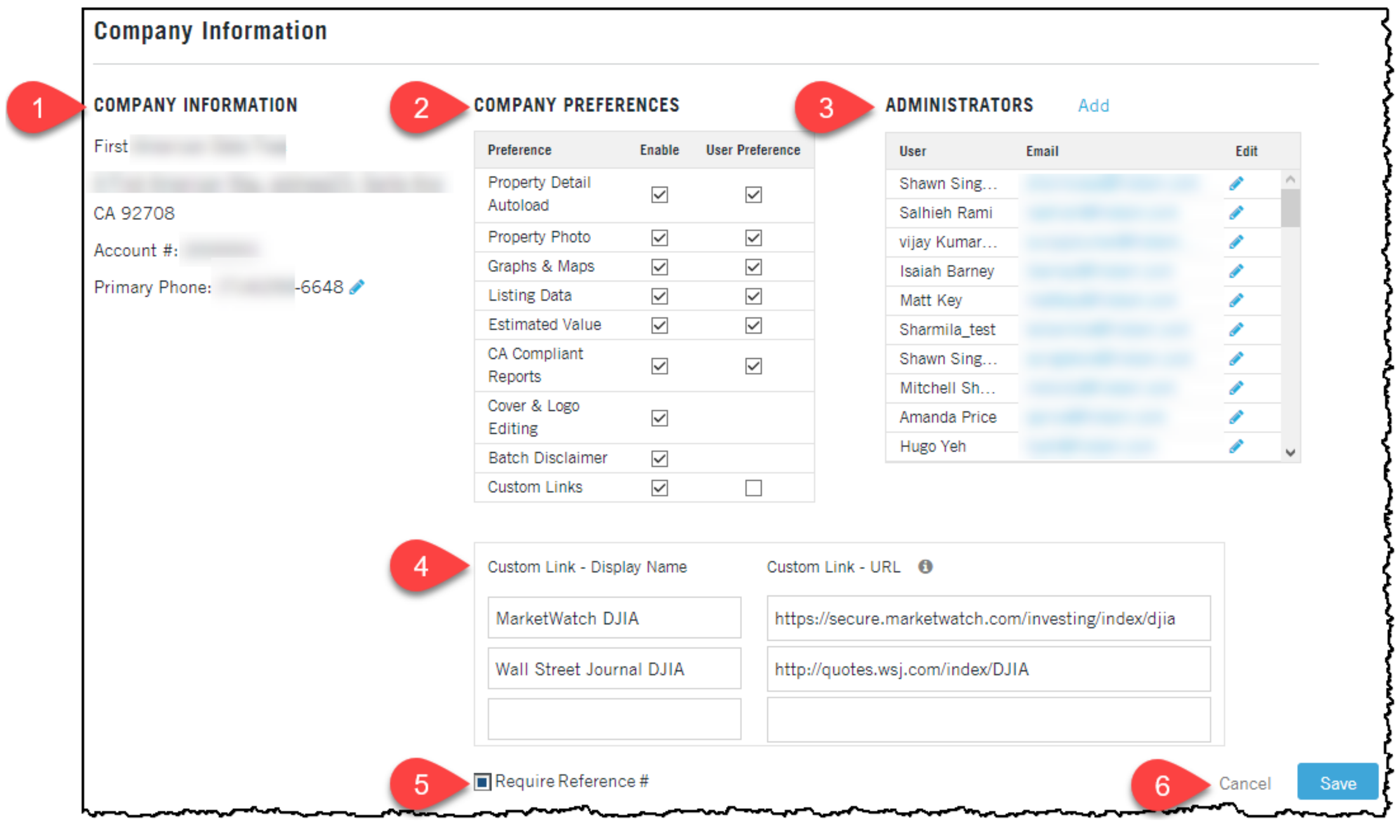
Company and Product Information

The Company option allows updates to your company information, preferences, adding administrators, links and an audit trail.

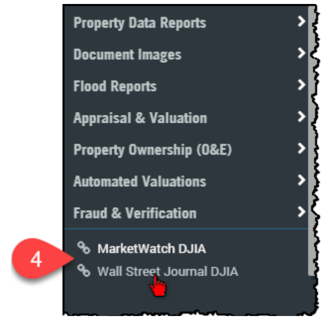


Company Information:

See the table following for information on each section.

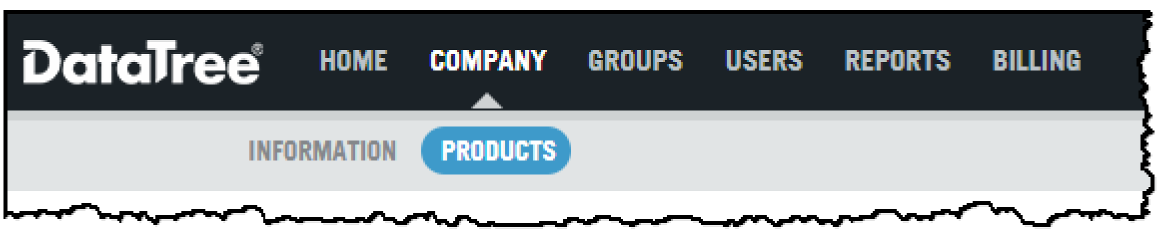


1.	Basic company information.
2.	Features that can be activated or deactivated for all users and groups. These may be features that are not permitted for certain uses by local or state regulations. Enable indicates that the feature shows for all users/groups. Selected User Preference allows users to turn the feature on or off independently.
3.	A list of administrators for your company. Click Add to create and add new administrators. Click the pencil to edit an administrator.

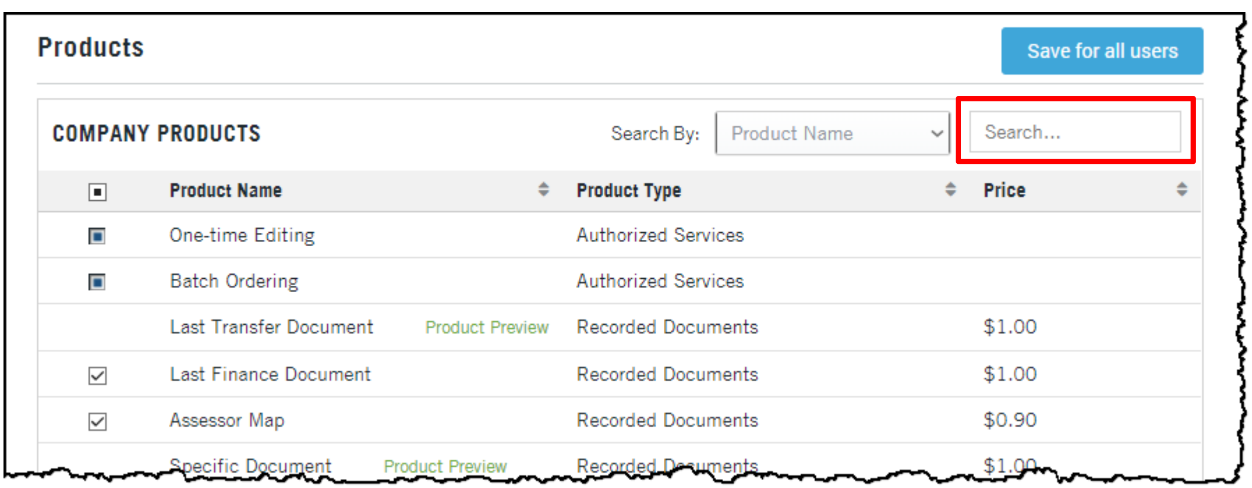
4.	Allows the addition of custom links to the left hand product panel as shown below. 
5.	Requires users to enter a reference number for billing purposes. The reference number will show on the usage and invoice.
6.	Save or Cancel

Products

The list of available products is governed by your company's DataTree contact. As the company administrator, you can add or remove access to these reports within the limits of your contract.



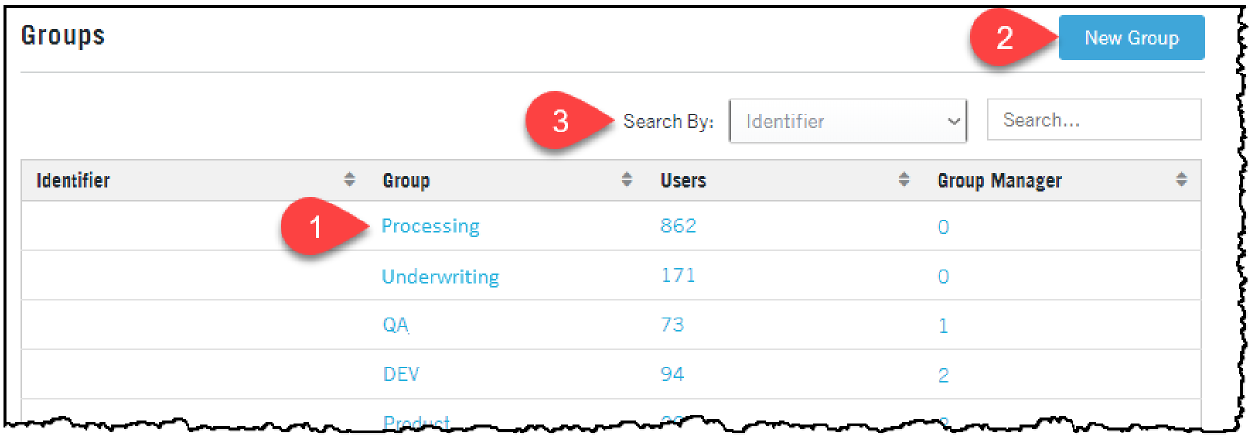
In the Products list, you can enable or disable reports available to your users. Make sure to click Save after making any modifications. As the list can be extensive, use the Search field to help you find the service.



Groups

Groups allow you to organize users and have the following attributes:

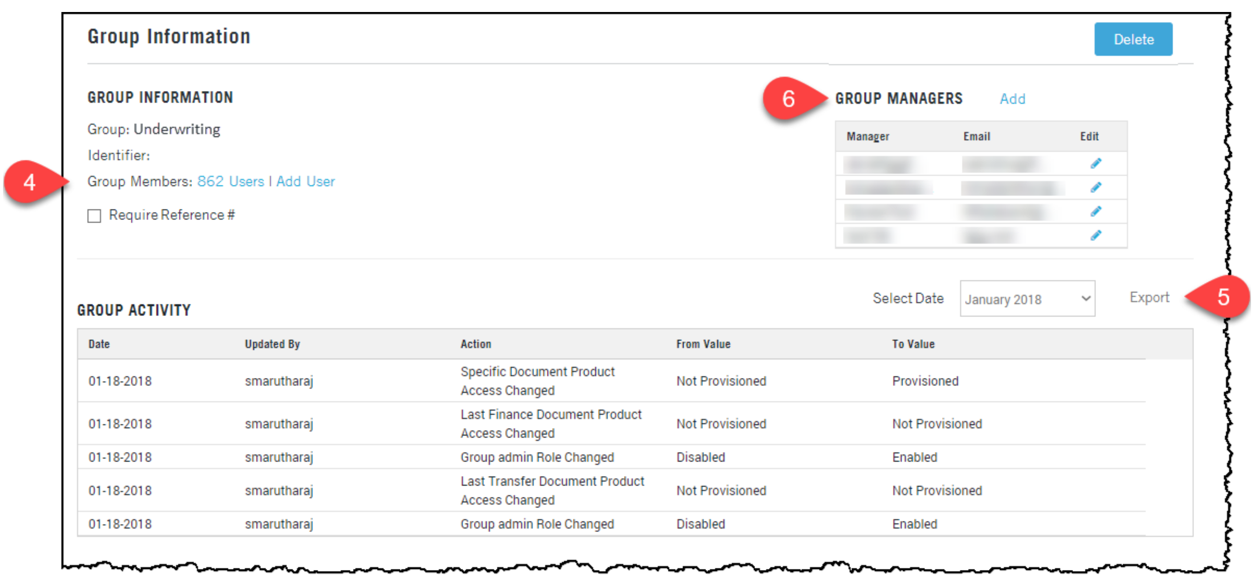
- Unique permissions that limit user(s) to specific reports or services.
- Require a reference number for any order made by the group's users.
- Group Managers to manage that group (or groups).



Click on any group (1) to add users or view an audit trail of the group activity. You can create new groups by clicking New Group (2) or search for groups (3).

Group Information

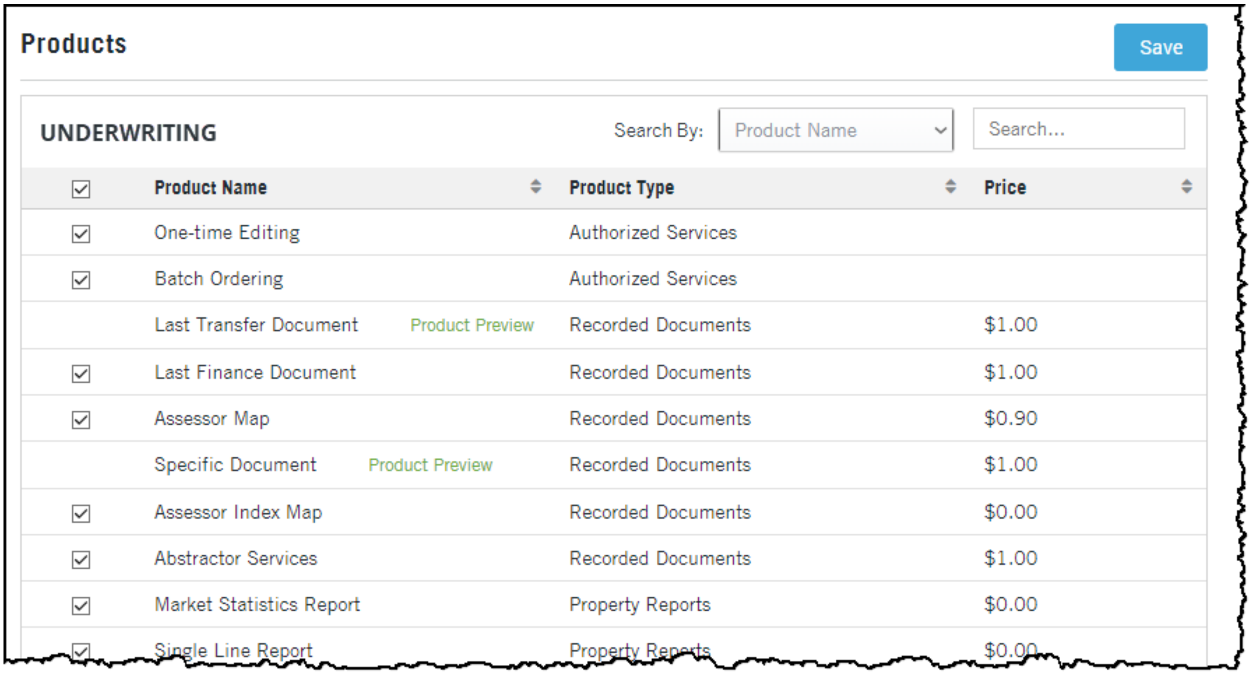
If you click on a group (1, above), the Group Information page will load. Click either the number of group members or the Add Users link (4) to manage existing or add users, respectively. Click Export (5) to export the audit trail for a selected month. You can add or edit Group Managers (6).



Note that if you click Add User or Add (Group Managers), it presumes the user account already exists. Use the search dialog to find the ~~account~~ user? to add it to the Group.

Group Products

Groups can further limit which reports are available to the group's membership. This will be useful to ensure that only the reports necessary for a team or role are available, thereby limiting unnecessary orders. Select or deselect checkboxes as required to limit access to reports or services. Make sure to click Save when you are finished.

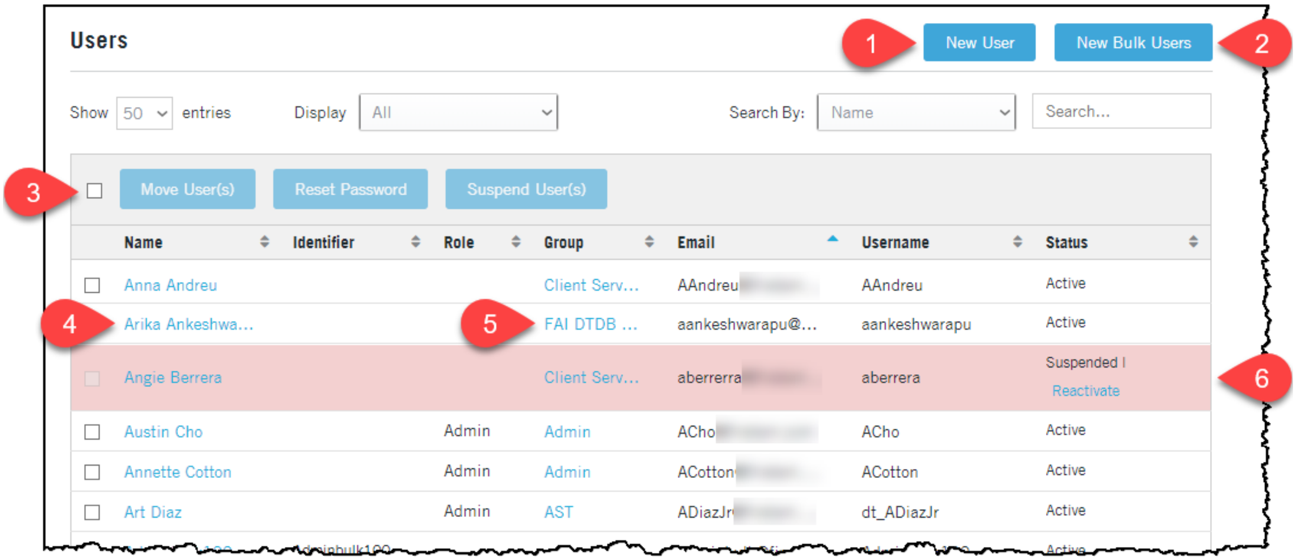


☑	Product Name	Product Type	Price
☑	One-time Editing	Authorized Services	
☑	Batch Ordering	Authorized Services	
	Last Transfer Document Product Preview	Recorded Documents	$1.00
☑	Last Finance Document	Recorded Documents	$1.00
☑	Assessor Map	Recorded Documents	$0.90
	Specific Document Product Preview	Recorded Documents	$1.00
☑	Assessor Index Map	Recorded Documents	$0.00
☑	Abstractor Services	Recorded Documents	$1.00
☑	Market Statistics Report	Property Reports	$0.00
☑	Single Line Report	Property Reports	$0.00

Users

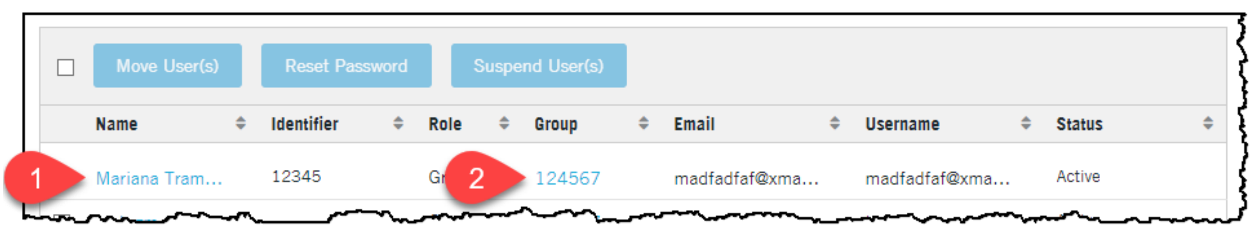
How to create, manage, or suspend user accounts.

In the Users list, you can add a new user (1), add users in bulk via a spreadsheet (2), Move users to a different group?, Reset Passwords, or Suspend one or more user accounts (3), manage an existing user (4), jump to that user's group (5), or reactivate suspended user accounts (6).



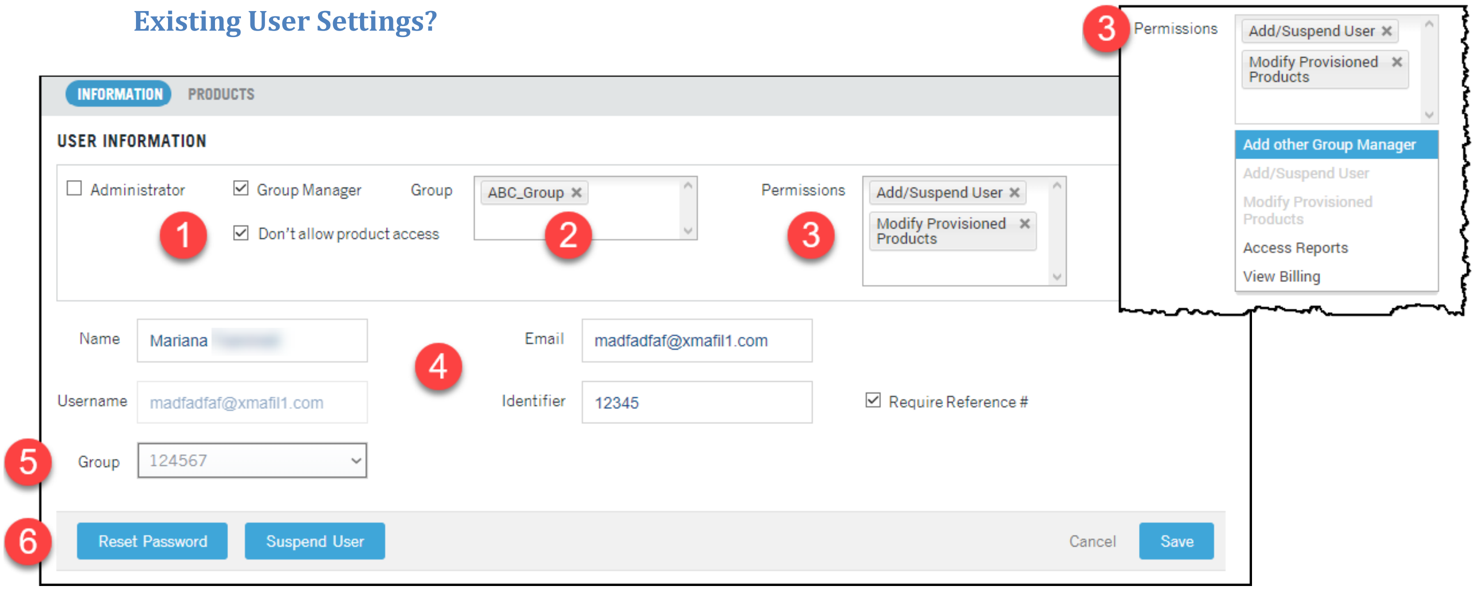
Modifying Existing Users

You may edit the properties of an existing user by clicking on their name (1).



(Details follow on the next page)

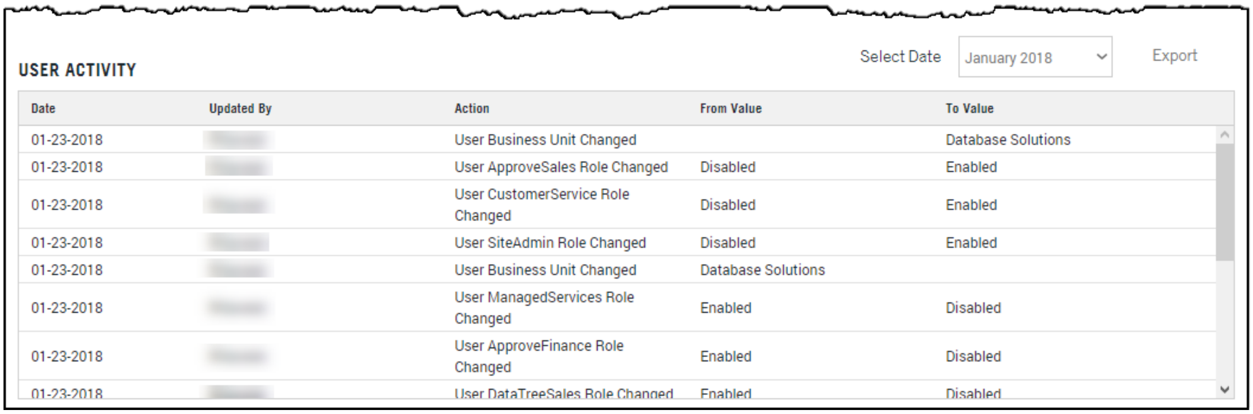
Existing User Settings?



1	Change the role of the individual by selecting or deselecting the Administrator or Group Manager. A Group Manager may be restricted to admin only access. Checking the Don't Allow Product Access box removes their product access. In the above example, this user is limited to group management and does not have product access. Leave all boxes unchecked for a standard user. Administrators have the ability to add, modify, suspend user accounts, create groups, and modify access to reports. Group Managers can perform a similar function for a group.
2	If you are using groups, a Group Manager may be assigned to manage more than one group for. If you are not using groups, ignore this option.
3	If you are using group managers, you can limit the permissions available to a group manager. The example shows a group manager with two permissions. Click inside the permissions list to reveal the other available permissions and click to add. Click the "x" to remove permissions.
4	You may edit the Name, Email, and Identifier or enable/disable the reference number. The Username is not editable.
5	If you are using groups select the group from which they will derive their product access.
6	Click to send a Reset Password link to users who forgot their password. You may suspend users who are no longer with the company or no longer need access to the platform. Finally, make sure to Save any changes.

See the following section on Product Access for Existing Users.

At the bottom of the User Information page is the user activity, or audit trail, showing what changes have been made to the users access. (if that is correct?)


USER ACTIVITY

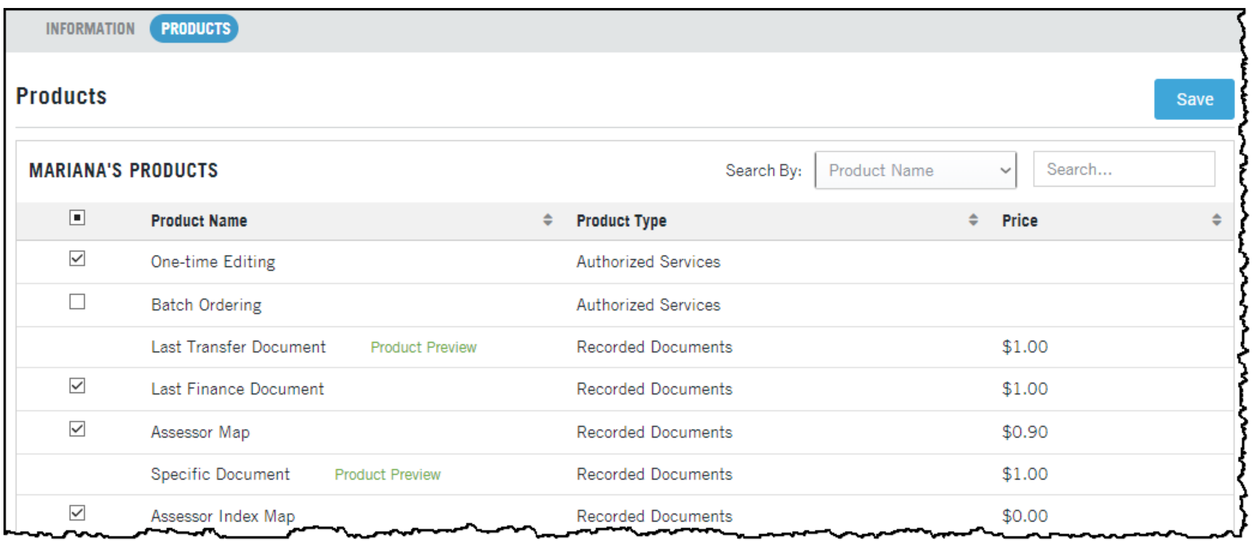
Select Date January 2018 Export

Date	Updated By	Action	From Value	To Value
01-23-2018		User Business Unit Changed		Database Solutions
01-23-2018		User ApproveSales Role Changed	Disabled	Enabled
01-23-2018		User CustomerService Role Changed	Disabled	Enabled
01-23-2018		User SiteAdmin Role Changed	Disabled	Enabled
01-23-2018		User Business Unit Changed	Database Solutions	
01-23-2018		User ManagedServices Role Changed	Enabled	Disabled
01-23-2018		User ApproveFinance Role Changed	Enabled	Disabled
01-23-2018		User DataTreeSales Role Changed	Enabled	Disabled

Existing User Product Access

You may update or modify the products a user may access by selecting or deselecting the checkboxes next to the product names. Use the Search By drop down to search for specific products or by Product Type. Click column headers to sort the information..

Products that do not have a checkbox are not provisioned at your company’s contract level. Contact your Account Manager if you want to enable these products.


INFORMATION PRODUCTS

Products Save

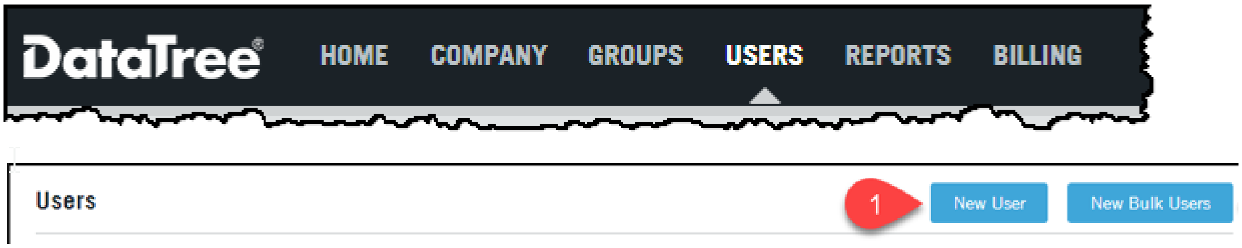
MARIANA'S PRODUCTS

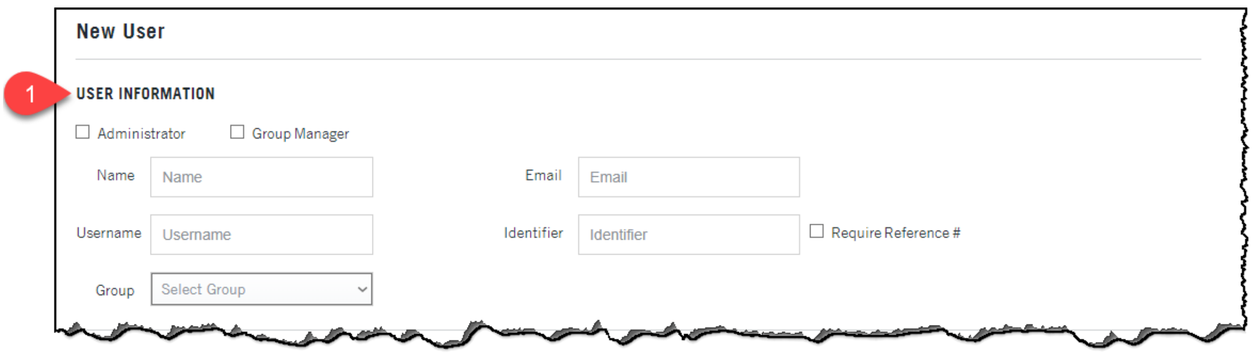
Search By: Product Name Search...

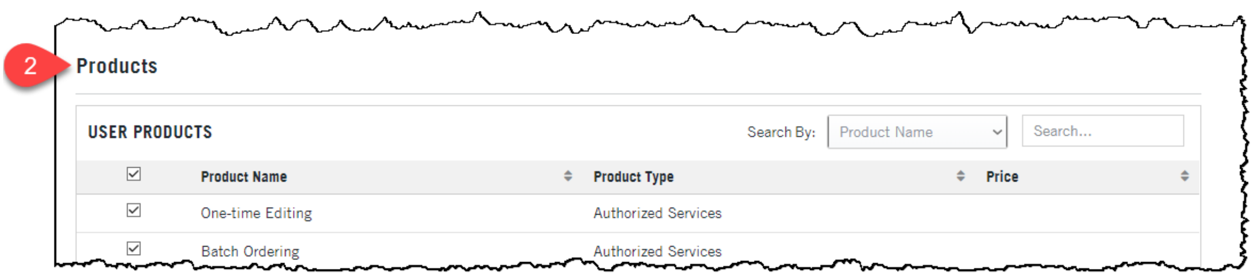
	Product Name	Product Type	Price
☑	One-time Editing	Authorized Services	
☐	Batch Ordering	Authorized Services	
	Last Transfer Document Product Preview	Recorded Documents	$1.00
☑	Last Finance Document	Recorded Documents	$1.00
☑	Assessor Map	Recorded Documents	$0.90
	Specific Document Product Preview	Recorded Documents	$1.00
☑	Assessor Index Map	Recorded Documents	$0.00

Creating New Users

Click New User to create a new user (1).





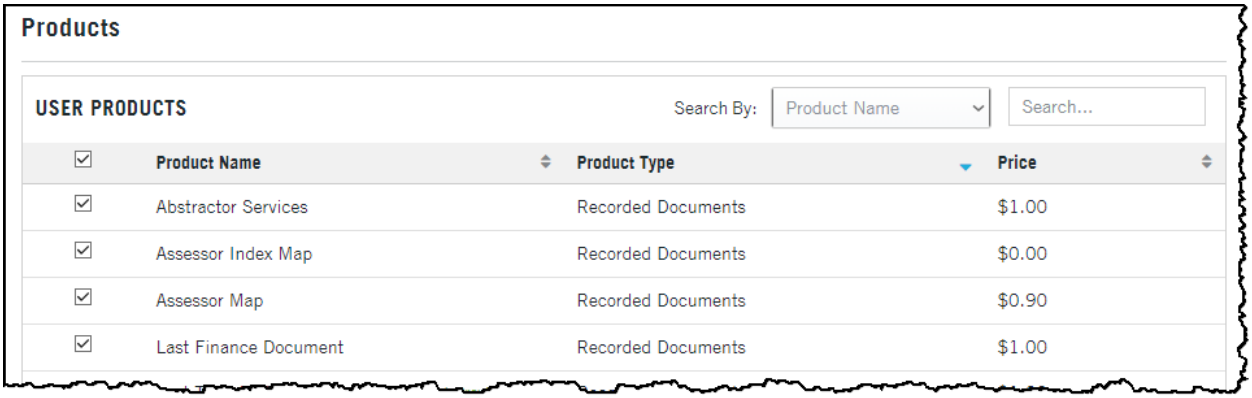


Complete the User Information (1) and Product (2) access. Before you click save, make any changes required to the product access (continued on following page).

Administration / Group Manager	Leave both boxes unchecked for a standard user. Administrators have the ability to add, modify, suspend user accounts, create groups, and modify access to reports. Group Managers can perform a similar function for a group.
Name:	This will be different from the username, below.
Email:	The email will also be added as the Username.
Username:	The default is the email address; it can be overwritten.
Identifier:	Any identifier your company requires. This is an optional field.
Require Reference #	Enable if you want a user-entered reference number for every order. The number will show on the usage and billing.
Group:	Select the group for this user. If none is selected, the user will be added to the Miscellaneous group (default).

Product Access

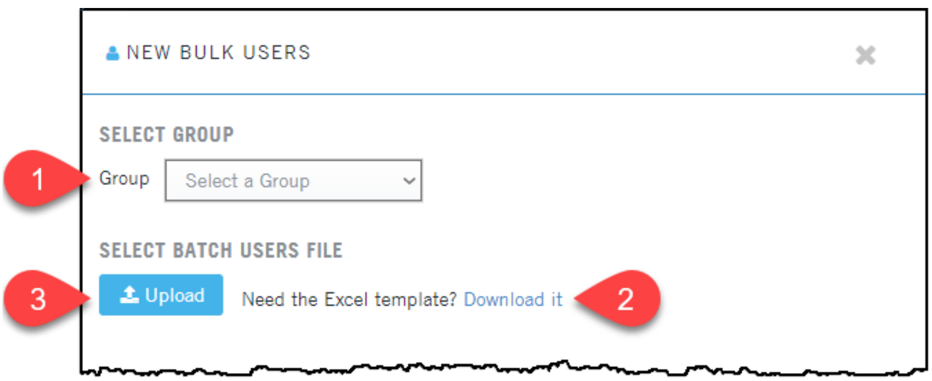
Select or deselect which reports the user can access. Use the search option to look for specific reports and remember that you can sort by column header.



Click Save when you are finished.

Bulk Upload of New Users

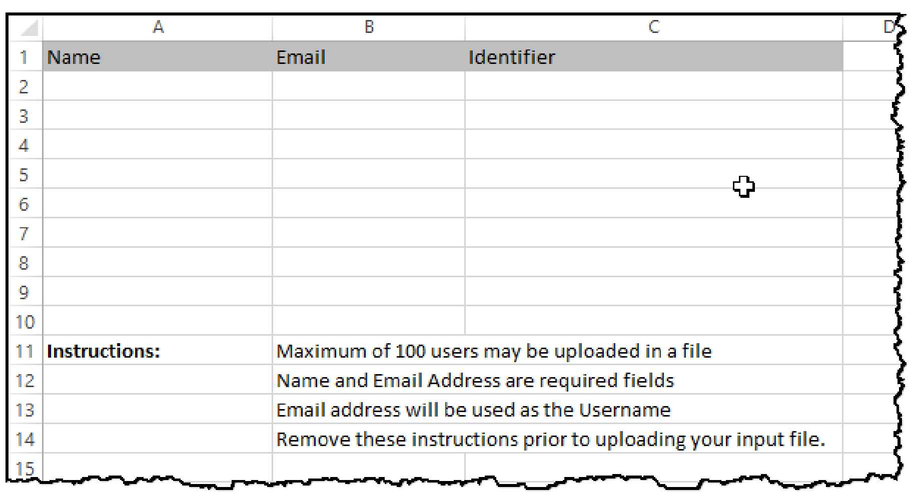
If you have a large number of users to add to DataTree, click the New Bulk Users menu option. This will provide a spreadsheet In the New Bulk Users dialog box.



Select a group (1) in which to add the users. If you are not using groups, leave this entry blank. This must be populated if the user is a Group Manager. If user is an admin, do not select.

Download the template (2) and complete the information in the spreadsheet.

Make sure to read the instructions. Save the spreadsheet.



When you are ready, click Upload (3) and upload your completed list.

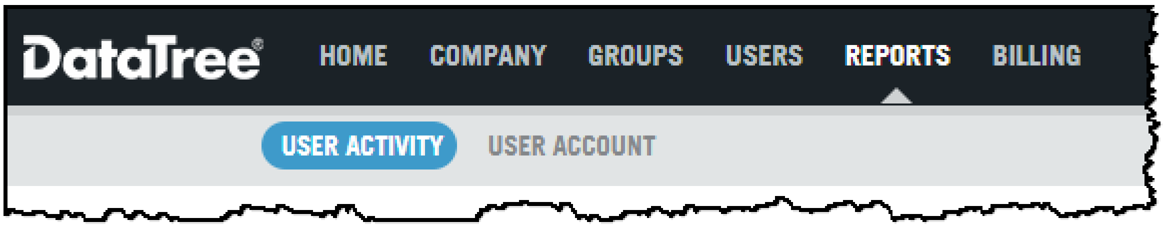
The new users will automatically receive their credentials over email.

After your users have been uploaded, you can adjust their report access as outlined above.

Reports

The Reports section provides usage information that you can export by user or group.

View the information by user activity or by user account.

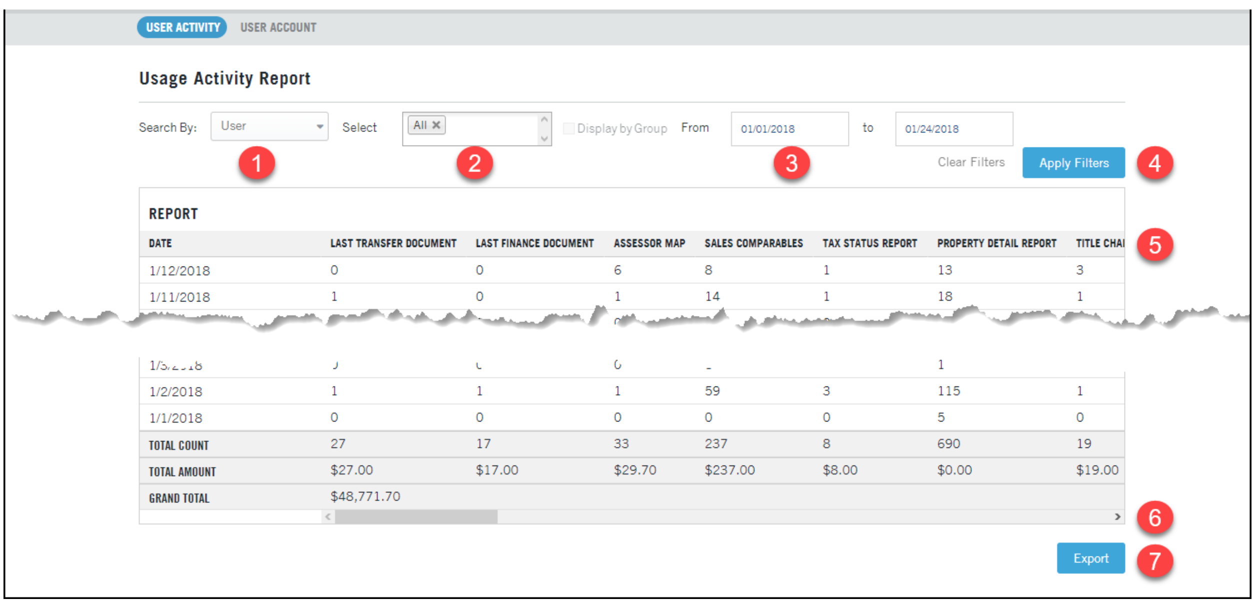


View User Activity

In the User Activity window, you may filter the list by User or Group (1), select specific users or groups to view (2) along with a date range (3). Click Apply Filters (or Clear Filter, 4).

The table (5) will display the filtered results. Note that you can scroll to the right/left to view the entire table (6).

When you are ready, click Export (7).



You can search by User or Group by changing the option in the Search By drop down and entering the user or group name(s) in the Select field.

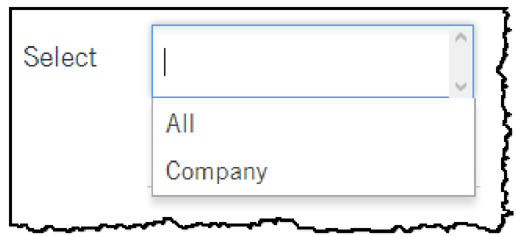
Search by User:

Search by Group:

Options:

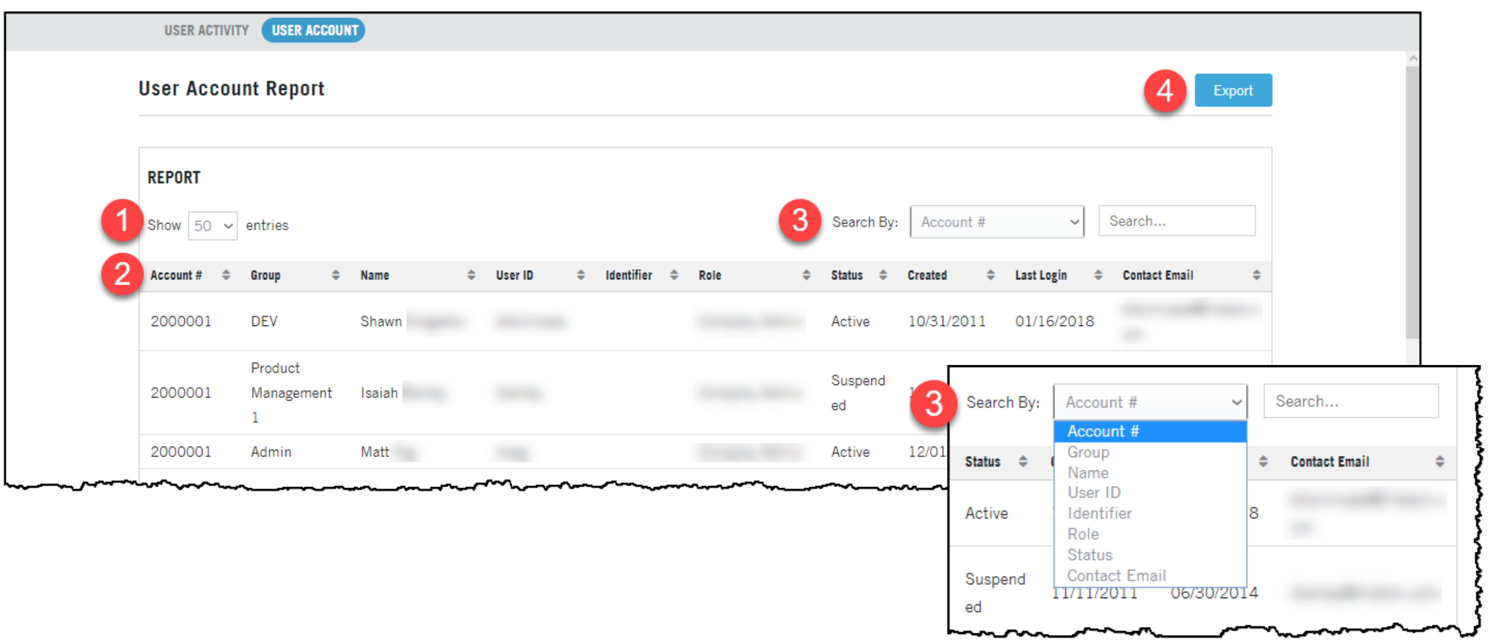
Selecting “All” will pull the company billing plus all billable groups.

Selecting “Company” will show all users and groups that are billed under the company billing.



User Account

You can also export usage by end user. Adjust the total number of rows per page (1) as required. Click to sort the column headers (2). Your list might be extensive and if you are looking for a specific user or set of users, the Search By (3) feature will be handy. Click Export (4) when you have the information you require. Your file will be exported as a .csv file. Different browsers handle the download process differently. Check your browser settings for download settings.



Billing

The Billing pages allow you to update billing contacts, view billing history, make payments and manage the credit card used (if required).

In the Billing Overview page, you may edit and delete existing Billing Contacts (1) or add new contacts (2).

You may make a payment (3) or manage the card (4) from this page as well. Your billing history will be listed (5) in the lower half of the page. The Billing History is filterable by year.